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From: Kay Nauta [kayn@naifacalifornia.org]
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To: Kay Nauta
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Importance: High

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Below is a compellation of all that was discussed on the November Call, please share with others – If I missed something or you have something to add, please let me know.

The call focused on the various aspects involved in creating an effective and efficient YAT agenda for the year, using California YAT best practices.

Key aspects for planning a year-long YAT agenda:

1. How to find a YAT Chair?

- Talk to the local LILI graduates for recommendations of an active member who is looking to help NAIFA
- Speak to general membership – Ask the members for recommendations for a YAT Chair – they don't have to be under 40 or 5 years or less in the business to start a YAT program
- Go to the board and ask for recommendations

2. Types of Meetings

- **YAT Breakfast/Lunch & Learns** - which typically includes breakfast or lunch (depending on the time) along with an educational speaker
- **YAT socials** - This is a fun event (sometimes held at a restaurant/bar) for YATs and general membership to socialize in a very laid back fun environment
- **Special events** - This could be a golf tournament, bowling event, holiday dinner or sporting event. The purpose of this type of YAT event is to get YATs together doing activities they enjoy outside of work.
- **YAT Networking Mixers** - This is much like a YAT social but attendees include those from other organizations as well, hosted by NAIFA. The networking mixer helps to build important business connections at an early age. The other organizations included are: the local CAL CPA chapter, CAL Bar Association, Emerging Insurance Professionals (P&C group), etc.

- **Fundraisers** - Several YAT locals have teamed up with non-profits to raise money for a good cause, as well as pick up a few \$\$\$ for the YAT program. The money raised by NAIFA for NAIFA goes to help fund events listed above (YAT mixers, networking events, and lunch & Learns).

3. Location

- **Look to Agencies to host the meeting** - this will help increase attendance significantly
- **If your local covers a large area, think about rotating meeting spots every other month for member convenience.** NAIFA-San Francisco Peninsula meets once a month in San Francisco, and the next month in Redwood city. This helps the YAT conveniently include all of its YAT members, as well as, keep ALL members involved.
- **Host social events** at a venue that is crowd friendly, and entertaining no matter how few members attend

4. Time

- **Test your market!** Do not be afraid to switch things up. NAIFA-San Fernando Valley switched from doing “Lunch & Learn” meetings, to a “Breakfast & Learn” which worked very well. The change in time provided a dramatic jump in attendance. Other locals have found that happy hour (wine, beer and appetizers) paired with a speaker make for a great turn out as well.

5. Date

- **Be consistent** – Try picking a date like the first Tuesday of every month
- **The more routine the better** - Schedule one breakfast lunch & learn a month. It may seem like a daunting task, but the more often and consistent the meeting, the better off attendance will be in the future. **Note:** *Attendance may be dismal at first, but do not give up. A routine and consistent program will pay off in the end.*

6. Who will help set up and implement the agenda

- **Delegate responsibility to your committee** - Ask each committee person to pick a month and be responsible for a speaker, and sponsor (if needed to pay for lunch or breakfast).
- **Get your board to get involved** - Ask the board to recommend speakers, sponsors, help in planning the YAT agenda.

7. Speakers

- **For a list of your local California Speakers email Kay at:** kayn@naifacalifornia.org
- Ask the board for a list of MDRT qualifiers
- Topics should be relevant and have an impact on immediate

business

- Sales ideas are always appreciated
- Know your audience: Find out what lines of business your YAT group sells, then make sure to deliver a diversified agenda appealing to those particular lines of business.

8. How to get the word out about YAT meetings

- Provide a YAT handout with a year-long agenda at a general meeting
- Ask the local president to highlight YAT events, achievements, and areas where YAT may need additional support.
- Send emails regarding mixers a month before, again a week before and the day before.
- Use outlook calendar reminders on invitations
- Use Agency Sales managers to spread the word at their agency
- Choose ambassadors for various groups, as a way to disseminate messages painlessly
- Call your YAT members a few days before a meeting. This not only helps boost attendance but creates a unique bond between the YAT members and the YAT group... get personal, be friendly, and let them know you want them there! Don't give up . . . calling does work... it just might take a few calls
- Provide your YAT group a year-long agenda at each meeting
- Use social media to keep YAT involved and informed
- Invite the entire General membership... they will help spread the word

9. Social Media

- **Meetup.com** – NAIFA-Mt. Diablo and NAIFA-San Francisco Peninsula use Meetup.com as a way to keep members in the loop about upcoming meetings, socials, events, and even general meetings. The program allows for members to discuss important issues, see who is attending the different events, RSVP... and much more
- **LinkedIn** – join California YAT CHAT LinkedIn Group. Start a linked in group for your local.

10. Key Resources:

Go to the YAT Website: www.naifa.org/yat

- [YAT Sign](#)
- [YAT Labels](#)
- [Sample Flyer](#) - Updated Monthly
- [Excel File](#) - Includes Committee list, Sign In sheet, Meeting Check List, Event Flyer for the year, Speaker Schedule
- **Does your local have a copy of the 2010 -2011 YAT Roster?**



If not contact nickelle@provada.com

P.S. Did you miss our webinar "Premium financing is back!" If so, you can view the recording version at <https://provada.ilinc.com/register/rrtvwhh>. Learn about new programs utilizing real estate and business assets as well as traditional methods of financing, with real-life case studies.